

connections ONLINE

Organization connection

Options:
View Another
Organization
View/Edit Dialog
New Dialog
Delete Dialog

Available reports:
Focus
Organization
Connection
Organization Dialog
Agenda
Organization Tree

ABC Financial Institution - 20% Market Share in Garfield County, with 40% household profitability!
QCKS Values, Integrity

Focus

Purpose : Help customers achieve
their financial dreams.

BHAG : 20% Market Share in Garfield
County, with 40% household
profitability!

Emotional Goal: 20/40 by 2006 by
helping dreams come true!

Strategy : (the unique and sustainable way)

business priorities: current

- | | |
|-----------------------------------|-----------|
| 1. Headquarters Renovation | 08/03/200 |
| 2. E-Branch | 10/15/200 |
| 3. Relationship Pricing System | 02/15/200 |
| 4. Expense reduction | 01/31/200 |
| 5. Outdated systems and processes | 12/31/200 |

critical measures

1. Financial Performance results		current minimum		meets	exceed
1. Monthly Net Income per Employee		1 mil	3 mil	4 mil	5 mil
2. Asset Growth		\$1.9 bil	\$1.2 bil	\$1.4 bil	\$1.7 bil
2. Preferred Financial Institution		current minimum		meets	exceed
1. Market segment Penetration		86%	80%	90%	95%
2. Loans per Customer		\$6553	\$6550	\$6650	\$6700
3. Operations		current minimum		meets	exceed
1. Functional Errors-back office per month		5	5	3	1
4. Employees		current minimum		meets	exceed
1. Satisfaction Survey		55%	500%	70%	80%

Figure 1

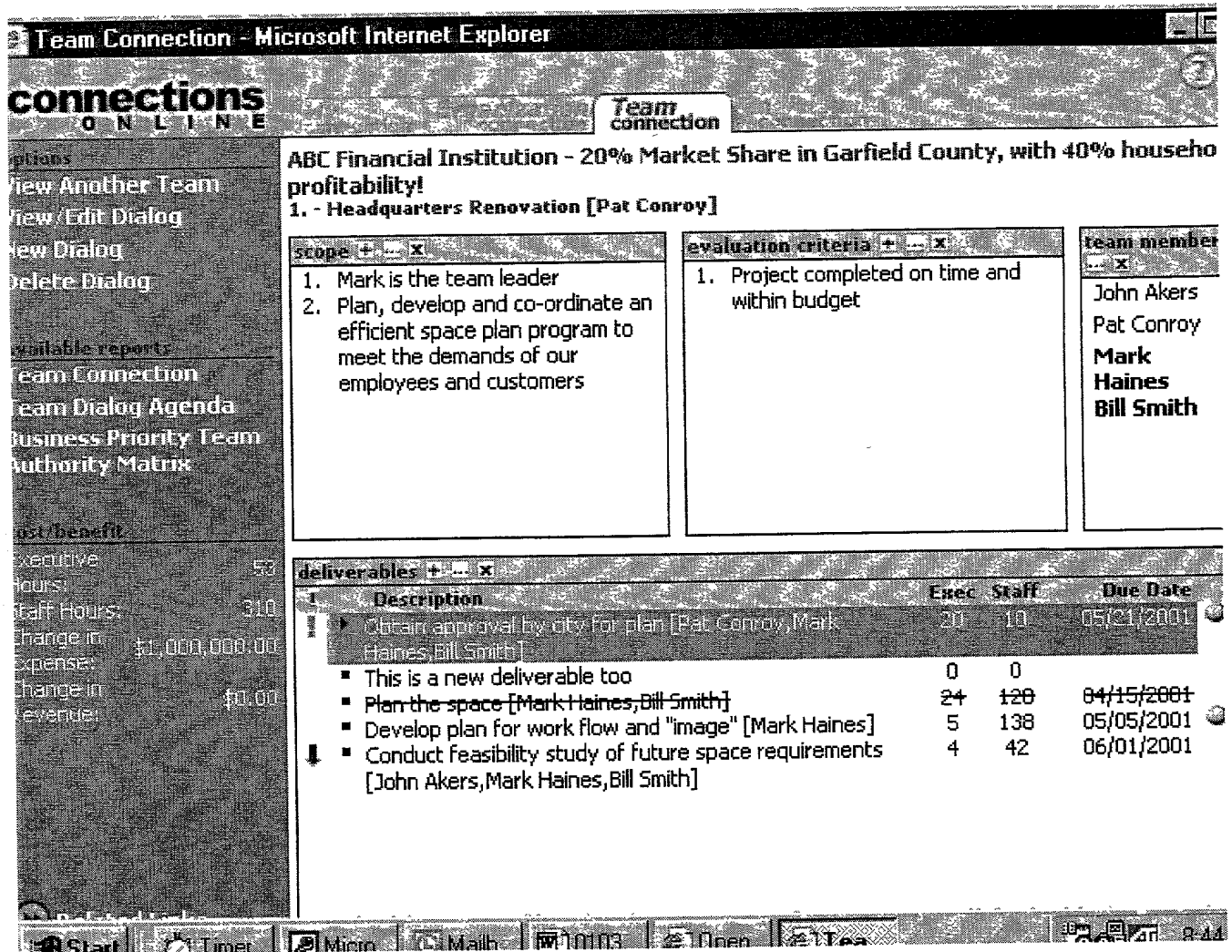


Figure 2

Individual Connection - Microsoft Internet Explorer

connections

ONLINE

Individual connection

ABC Financial Institution - 20% Market Share in Garfield County, with 40% household profitability!
Mark Haines - CFO

View Another Individual
View Another
Function, Department
View/Edit Dialog
New Dialog
Delete Dialog

Individual Connections
Dialog Agenda
Authority Matrix
Resource Utilization
Function, Department
Projects

Next Dialog: 04/09/2001

basic role + ... x

- 35% Balance Sheet Management and Strategy
 - 1. Retail Strategy Committee Decisions
 - 2. A/LM Strategies
- 35% Income and Expense Management
 - 1. Budget Variance Results
 - 2. Resource Allocation Planning/Implementation
- 20% Operational Management

overall accountability + ... x

- 1. Reinforcing the vision and achieving the strategic goals within my functional area of responsibility
- 2. Providing accurate and timely functional reports and analysis to provide the

business priorities + ... x

- 1. Headquarters Renovation 08/03/2001
 - Plan the space [Mark Haines, Bill Smith] 04/15/2001
 - Develop plan for work flow and "image" [Mark Haines] 05/05/2001
 - Obtain approval by city for plan [Pat Conroy, Mark Haines, Bill] 05/21/2001

Mayor rescheduled the visit 1

supervisory scope + ... x

- 1. Information technology (data processing, MIS, project management, payment services)
- 2. Collections (loan collections, asset liquidation, fraud)

function, department projects: finance + ... x

- 1. Develop ALCO matrix 10/01/2001
 - sdfsadf 03/01/2001
 - date 2 04/01/2001
 - date 1 05/01/2001
- 2. New Finance application installed

authority matrix + ... x

Level Authorities: Senior Vice President

- Budget and
- Contracting
- Human Resources
- Policies and
- Procedures

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Figure 3